

**FEC  
FORM 3X****REPORT OF RECEIPTS  
AND DISBURSEMENTS**  
For Other Than An Authorized Committee

Office Use Only

1. NAME OF  
COMMITTEE (in full)**USE FEC MAILING LABEL  
OR TYPE OR PRINT**Example: If typing, type  
over the lines

National Association of Insurance and Financial Advisors Political Action Comm

ADDRESS (number and street)

2901 Telestar Ct.

☐Check if different  
than previously  
reported. (ACC)

Falls Church

VA

22042

2. **FEC IDENTIFICATION NUMBER**

CITY

STATE

ZIP CODE

C00005249

3. IS THIS  
REPORT☒NEW  
(N)

OR

☐AMENDED  
(A)4. **TYPE OF REPORT**

(Choose One)

(a) Quarterly Reports:

☐April 15  
Quarterly Report(Q1)☐July 15  
Quarterly Report(Q2)☐October 15  
Quarterly Report(Q3)☐January 31  
Quarterly Report(YE)☐July 31 Mid-Year  
Report(Non-election  
Year Only) (MY)☐Termination Report  
(TER)(b) Monthly  
Report  
Due On:☒

Feb 20 (M2)

☐

May 20 (M5)

☐

Aug 20 (M8)

☐Nov 20 (M11)  
(Non-Election  
Year Only)☐

Mar 20 (M3)

☐

Jun 20 (M6)

☐

Sep 20 (M9)

☐Dec 20 (M12)  
(Non-Election  
Year Only)☐

Apr 20 (M4)

☐

Jul 20 (M7)

☐

Oct 20 (M10)

☐

Jan 31 (YE)

(c) 12-Day  
PRE-Election  
Report for the:☐

Primary (12P)

☐

General (12G)

☐

Runoff (12R)

☐

Convention (12C)

☐

Special (12G)

Election on

in the  
State of(d) 30-Day  
Post -Election  
Report for the:☐

General (30G)

☐

Runoff (30R)

☐

Special (30S)

Election on

in the  
State of

5. Covering Period

01

01

2008

through

01

31

2008

I certify that I have examined this Report and to the best of my knowledge and belief it is true, correct and complete.

Type or Print Name of Treasurer

Peter C. Brown

Signature of Treasurer

Electronically Filed by Peter C. Brown

Date

02

19

2008

NOTE : Submission of false, erroneous, or incomplete information may subject the person signing this Report to the penalties of 2 U.S.C 437g.

Office  
Use  
Only**FEC FORM 3X**  
(Rev. 12/2004)

# SUMMARY PAGE OF RECEIPTS AND DISBURSEMENTS

FEC Form 3X (Rev. 02/2003)

Page 2

Write or Type Committee Name

National Association of Insurance and Financial Advisors Political Action Comm

Report Covering the Period:

From:

M	M	D	D	Y	Y	Y	Y
0	1	0	1	2	0	0	8

To:

M	M	D	D	Y	Y	Y	Y
0	1	3	1	2	0	0	8

	COLUMN A This Period	COLUMN B Calendar Year-to-Date
6. (a) Cash on Hand January 1 <span>2008</span>		389938.49
(b) Cash on Hand at Beginning of Reporting Period .....	389938.49	
(c) Total Receipts (from Line 19) .....	69644.75	69644.75
(d) Subtotal (add lines 6(b) and 6(c) for Column A and Lines 6(a) and 6(c) for Column B) .....	459583.24	459583.24
7. Total Disbursements (from Line 31) .....	2014.73	2014.73
8. Cash on Hand at Close of Reporting Period (subtract Line 7 from Line 6(d)) .....	457568.51	457568.51
9. Debts and Obligations owed <b>TO</b> the committee (Itemize all on Schedule C and/or Schedule D) .....	0.00	
10. Debts and Obligations owed <b>BY</b> the committee (Itemize all on Schedule C and/or Schedule D) .....	45487.49	

☒ This Committee has qualified as a multicandidate committee. (see FEC FORM 1M)

## For further information contact:

Federal Election Commission  
999 E street, NW  
Washington, DC 20463

Toll Free 800-424-9530  
Local 202-694-1100

# **DETAILED SUMMARY PAGE OF RECEIPTS**

FEC Form 3X (Rev. 06/2004)

Page 3

Write or Type Committee Name

National Association of Insurance and Financial Advisors Political Action Comm

Report Covering the Period:

From:

M	M
0	1

D	D
0	1

Y	Y	Y	Y
2	0	0	8

To:

M	M
0	1

D	D
3	1

Y	Y	Y	Y
2	0	0	8

I. Receipts	COLUMN A Total This Period	COLUMN B Calendar Year-to-Date
11. Contributions (other than loans) From:		
(a) Individuals/Persons Other Than Political Committees	13127.91	13127.91
(i) Itemized (use Schedule A) .....		
(ii) Unitemized .....	56516.84	56516.84
(iii) TOTAL (add Lines 11(a)(i) and (ii) ..... ➡	69644.75	69644.75
(b) Political Party Committees .....	0.00	0.00
(c) Other Political Committees (such as PACs) .....	0.00	0.00
(d) Total Contributions (add Lines 11(a)(iii),(b) and (c)) (Carry Totals to Line 33, page 5) ..... ➡	69644.75	69644.75
12. Transfers From Affiliated/Other Party Committees .....	0.00	0.00
13. All Loans Received .....	0.00	0.00
14. Loan Repayments Received .....	0.00	0.00
15. Offsets To Operating Expenditures (Refunds, Rebates, etc.) (Carry Totals to Line 37, page 5) .....	0.00	0.00
16. Refunds of Contributions Made to Federal candidates and Other Political Committees .....	0.00	0.00
17. Other Federal Receipts (Dividends, Interest, etc.) .....	0.00	0.00
18. Transfers from Non-Federal and Levin Funds		
(a) Non-Federal Account (from Schedule H3) .....	0.00	0.00
(b) Levin Funds (from Schedule H5) .....	0.00	0.00
(c) Total Transfer (add 18(a) and 18(b)).	0.00	0.00
19. Total Receipts (add Lines 11(d), 12, 13, 14, 15, 16, 17, and 18(c)) .....	69644.75	69644.75
20. Total Federal Receipts (subtract Line 18(c) from Line 19) .....	69644.75	69644.75

**DETAILED SUMMARY PAGE**

of Disbursements

FEC Form 3X (Rev. 02/2003)

Page 4

II. DISBURSEMENTS	COLUMN A Total This Period	COLUMN B Calendar Year-to-Date
21. Operating Expenditures:		
(a) Shared Federal/Non-Federal Activity (from Schedule H4)		
(i) Federal Share.....	0.00	0.00
(ii) Non-Federal Share.....	0.00	0.00
(b) Other Federal Operating Expenditures.....	2014.73	2014.73
(c) Total Operating Expenditures (add 21(a)(i), (a)(ii) and (b))..... ➡	2014.73	2014.73
22. Transfers to Affiliated/Other Party Committees.....	0.00	0.00
23. Contributions to Federal Candidates/Committees and Other Political Committees.....	0.00	0.00
24. Independent Expenditure (use Schedule E) .....	0.00	0.00
25. Coordinated Expenditures Made by Party Committees (2 U.S.C. 441a(d)) (use Schedule F).....	0.00	0.00
26. Loan Repayments Made.....	0.00	0.00
27. Loans Made.....	0.00	0.00
28. Refunds of Contributions To:		
(a) Individuals/Persons Other Than Political Committees .....	0.00	0.00
(b) Political Party Committees .....	0.00	0.00
(c) Other Political Committees (such as PACs) .....	0.00	0.00
(d) Total Contribution Refunds (add Lines 28(a), (b), and (c)) .....	0.00	0.00
29. Other Disbursements.....	0.00	0.00
30. Federal Election Activity (2 U.S.C 431(20))		
(a) Shared Federal Election Activity (from Schedule H6)		
(i) Federal Share .....	0.00	0.00
(ii) "Levin" Share .....	0.00	0.00
(b) Federal Election Activity Paid Entirely With Federal Funds .....	0.00	0.00
(c) Total Federal Election Activity (add Lines 30(a)(i), 30(a)(ii) and 30(b))....	0.00	0.00
31. Total Disbursements (add Lines 21(c), 22, 23, 24, 25, 26, 27, 28(d), 29 and 30(c))..	2014.73	2014.73
32. Total Federal Disbursements (subtract Line 21(a)(ii) and Line 30(a)(ii) from Line 31).....	2014.73	2014.73

**DETAILED SUMMARY PAGE**

of Disbursements

FEC Form 3X (Rev. 02/2003)

Page 5

III. Net Contributions/Operating Expenditures	COLUMN A Total This Period	COLUMN B Calendar Year-to-Date
33. Total Contributions (other than loans) from Line 11(d), page 3) .....	69644.75	69644.75
34. Total Contribution Refunds (from Line 28(d)) .....	0.00	0.00
35. Net Contributions (other than loans) (subtract Line 34 from Line 33) .....	69644.75	69644.75
36. Total Federal Operating Expenditures (add Line 21(a)(i) and Line 21(b)).....	2014.73	2014.73
37. Offsets to Operating Expenditures (from Line 15, page 3) .....	0.00	0.00
38. Net Operating Expenditures (subtract Line 37 from Line 36) .....	2014.73	2014.73

# **SCHEDULE A (FEC Form 3X)** **ITEMIZED RECEIPTS**

Use separate schedule(s)  
for each category of the  
Detailed Summary Page

FOR LINE NUMBER: PAGE 6 / 20

(check only one)

☒ 11a ☐ 11b ☐ 11c ☐ 12  
☐ 13 ☐ 14 ☐ 15 ☐ 16 ☐ 17

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NAME OF COMMITTEE (In Full)

National Association of Insurance and Financial Advisors Political Action Comm

**A.**

Full Name (Last, First, Middle Initial)

Mr. D. Scott Brennan

Mailing Address 1418 E Wayne St

City

South Bend

State

IN

Zip Code

46615-1040

FEC ID number of contributing  
federal political committee.

C

Name of Employer  
The Brennan Group

Occupation  
President

Receipt For:

☐ Primary ☐ General  
☐ Other (specify) ▼

Aggregate Year-to-Date ▼

400.00

Date of Receipt

M M / D D / Y Y Y Y  
0 1 / 0 2 / 2 0 0 8

Transaction ID: 6479895

Amount of Each Receipt this Period

400.00

**B.**

Full Name (Last, First, Middle Initial)

Ms. Cathy Neifeld

Mailing Address 233 S. 6th Street  
Apt 810

City

Philadelphia

State

PA

Zip Code

19106-3718

FEC ID number of contributing  
federal political committee.

C

Name of Employer  
Cathy Neifeld Agency

Occupation  
Insurance Agent

Receipt For:

☐ Primary ☐ General  
☐ Other (specify) ▼

Aggregate Year-to-Date ▼

250.00

Date of Receipt

M M / D D / Y Y Y Y  
0 1 / 0 4 / 2 0 0 8

Transaction ID: 6480067

Amount of Each Receipt this Period

250.00

**C.**

Full Name (Last, First, Middle Initial)

Mr. Patrick J. McNamara

Mailing Address P O Box 1227

City

Ann Arbor

State

MI

Zip Code

48104-1227

FEC ID number of contributing  
federal political committee.

C

Name of Employer  
Financial Concepts, Inc.

Occupation  
Principal

Receipt For:

☐ Primary ☐ General  
☐ Other (specify) ▼

Aggregate Year-to-Date ▼

500.00

Date of Receipt

M M / D D / Y Y Y Y  
0 1 / 0 5 / 2 0 0 8

Transaction ID: 6480092

Amount of Each Receipt this Period

500.00

**SUBTOTAL** of Receipts This Page (optional) .....

1150.00

**TOTAL** This Period (last page this line number only) .....

# **SCHEDULE A (FEC Form 3X)** **ITEMIZED RECEIPTS**

Use separate schedule(s)  
for each category of the  
Detailed Summary Page

FOR LINE NUMBER: PAGE 7 / 20

(check only one)

☒ 11a ☐ 11b ☐ 11c ☐ 12  
☐ 13 ☐ 14 ☐ 15 ☐ 16 ☐ 17

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NAME OF COMMITTEE (In Full)

National Association of Insurance and Financial Advisors Political Action Comm

**A.**

Full Name (Last, First, Middle Initial)

Mr. Joe Dale Viniard

Mailing Address 7413 Cambridge Dr.

City

Crestwood

State

KY

Zip Code

40014-8931

FEC ID number of contributing  
federal political committee.

C

Name of Employer  
State Farm Insurance Comp-  
anies

Occupation

Insurance Agent

Receipt For:

☐ Primary ☐ General  
☐ Other (specify) ▼

Aggregate Year-to-Date ▼

219.00

Date of Receipt

M M / D D / Y Y Y Y Y  
0 1 / 0 2 / 2 0 0 8

Transaction ID: 6480104

Amount of Each Receipt this Period

219.00

**B.**

Full Name (Last, First, Middle Initial)

Mr. Charles B. Prothro

Mailing Address 2028 Avondale

City

Wichita Falls

State

TX

Zip Code

76308

FEC ID number of contributing  
federal political committee.

C

Name of Employer  
Charles Prothro Financial

Occupation

OWNER

Receipt For:

☐ Primary ☐ General  
☐ Other (specify) ▼

Aggregate Year-to-Date ▼

300.00

Date of Receipt

M M / D D / Y Y Y Y Y  
0 1 / 0 2 / 2 0 0 8

Transaction ID: 6480106

Amount of Each Receipt this Period

300.00

**C.**

Full Name (Last, First, Middle Initial)

Mr. James V. Durkin

Mailing Address 408 N Saint Asaph St

City

Alexandria

State

VA

Zip Code

22314-2318

FEC ID number of contributing  
federal political committee.

C

Name of Employer  
Lincoln Financial Advisors

Occupation

Managing\_Principal

Receipt For:

☐ Primary ☐ General  
☐ Other (specify) ▼

Aggregate Year-to-Date ▼

250.00

Date of Receipt

M M / D D / Y Y Y Y Y  
0 1 / 0 8 / 2 0 0 8

Transaction ID: 6502882

Amount of Each Receipt this Period

250.00

**SUBTOTAL** of Receipts This Page (optional) .....

769.00

**TOTAL** This Period (last page this line number only) .....

# **SCHEDULE A (FEC Form 3X)** **ITEMIZED RECEIPTS**

Use separate schedule(s)  
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Detailed Summary Page

FOR LINE NUMBER: PAGE 8 / 20

(check only one)

☒ 11a ☐ 11b ☐ 11c ☐ 12  
☐ 13 ☐ 14 ☐ 15 ☐ 16 ☐ 17

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NAME OF COMMITTEE (In Full)

National Association of Insurance and Financial Advisors Political Action Comm

**A.**

Full Name (Last, First, Middle Initial)

Mr. Ronald D. Brant

Mailing Address 10234 Hoffman

City

Maybee

State

MI

Zip Code

48159-9777

FEC ID number of contributing  
federal political committee.

C

Name of Employer  
Jefferson Pilot Financial

Occupation  
AGENT

Receipt For:

☐ Primary ☐ General  
☐ Other (specify) ▼

Aggregate Year-to-Date ▼

208.00

Date of Receipt

M M / D D / Y Y Y Y  
0 1 / 1 0 / 2 0 0 8

Transaction ID: 6503848

Amount of Each Receipt this Period

208.00

**B.**

Full Name (Last, First, Middle Initial)

Mr. David E. Smithkey

Mailing Address 9451 Heddy Drive

City

Flushing

State

MI

Zip Code

48433

FEC ID number of contributing  
federal political committee.

C

Name of Employer  
Security First Benefits  
Corp.

Occupation  
President/Owner

Receipt For:

☐ Primary ☐ General  
☐ Other (specify) ▼

Aggregate Year-to-Date ▼

208.00

Date of Receipt

M M / D D / Y Y Y Y  
0 1 / 1 0 / 2 0 0 8

Transaction ID: 6505030

Amount of Each Receipt this Period

208.00

**C.**

Full Name (Last, First, Middle Initial)

Mr. Russell A. Smith

Mailing Address 22928 San Joaquin Drive East

City

Canyon Lake

State

CA

Zip Code

92587-7831

FEC ID number of contributing  
federal political committee.

C

Name of Employer  
Torimax Financial Group,  
Inc.

Occupation  
President & CEO

Receipt For:

☐ Primary ☐ General  
☐ Other (specify) ▼

Aggregate Year-to-Date ▼

208.00

Date of Receipt

M M / D D / Y Y Y Y  
0 1 / 1 0 / 2 0 0 8

Transaction ID: 6505350

Amount of Each Receipt this Period

208.00

**SUBTOTAL** of Receipts This Page (optional) .....

624.00

**TOTAL** This Period (last page this line number only) .....



# **SCHEDULE A (FEC Form 3X)** **ITEMIZED RECEIPTS**

Use separate schedule(s)  
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Detailed Summary Page

FOR LINE NUMBER: PAGE 9 / 20

(check only one)

☒ 11a ☐ 11b ☐ 11c ☐ 12  
☐ 13 ☐ 14 ☐ 15 ☐ 16 ☐ 17

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NAME OF COMMITTEE (In Full)

National Association of Insurance and Financial Advisors Political Action Comm

**A.**

Full Name (Last, First, Middle Initial)

Mr. H. Dan Smith

Mailing Address 1616 Rio Vista

City

Dallas

State

TX

Zip Code

75208-2338

FEC ID number of contributing  
federal political committee.

C

Name of Employer  
State Farm Insurance Comp-  
anies

Occupation

Insurance Agent

Receipt For:

☐ Primary ☐ General  
☐ Other (specify) ▼

Aggregate Year-to-Date ▼

215.00

Date of Receipt

M M / D D / Y Y Y Y  
0 1 / 1 0 / 2 0 0 8

Transaction ID: 6505424

Amount of Each Receipt this Period

215.00

**B.**

Full Name (Last, First, Middle Initial)

Mr. R. Jan Pinney

Mailing Address 5152 Ellington Court

City

Granite Bay

State

CA

Zip Code

95746-7188

FEC ID number of contributing  
federal political committee.

C

Name of Employer  
Pinney Insurance Center,  
Inc.

Occupation

General Agent

Receipt For:

☐ Primary ☐ General  
☐ Other (specify) ▼

Aggregate Year-to-Date ▼

208.00

Date of Receipt

M M / D D / Y Y Y Y  
0 1 / 1 0 / 2 0 0 8

Transaction ID: 6505474

Amount of Each Receipt this Period

208.00

**C.**

Full Name (Last, First, Middle Initial)

Mr. Terry K. Headley

Mailing Address 20704 Meadow Ridge Dr

City

Springfield

State

NE

Zip Code

68059-7086

FEC ID number of contributing  
federal political committee.

C

Name of Employer  
The Principal Financial  
Group

Occupation

General Agent

Receipt For:

☐ Primary ☐ General  
☐ Other (specify) ▼

Aggregate Year-to-Date ▼

208.00

Date of Receipt

M M / D D / Y Y Y Y  
0 1 / 1 0 / 2 0 0 8

Transaction ID: 6506964

Amount of Each Receipt this Period

208.00

**SUBTOTAL** of Receipts This Page (optional) .....

631.00

**TOTAL** This Period (last page this line number only) .....

# **SCHEDULE A (FEC Form 3X)** **ITEMIZED RECEIPTS**

Use separate schedule(s)  
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Detailed Summary Page

FOR LINE NUMBER: PAGE 10 / 20

(check only one)

☒ 11a ☐ 11b ☐ 11c ☐ 12  
☐ 13 ☐ 14 ☐ 15 ☐ 16 ☐ 17

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NAME OF COMMITTEE (In Full)

National Association of Insurance and Financial Advisors Political Action Comm

**A.**

Full Name (Last, First, Middle Initial)

Mr. Richard J. Rosenthal

Mailing Address 8912 SW 81 Terr

City

Miami

State

FL

Zip Code

33173-4189

FEC ID number of contributing  
federal political committee.

C

Name of Employer  
The Rosenthal Agency, Inc

Occupation  
President

Receipt For:

☐ Primary ☐ General  
☐ Other (specify) ▼

Aggregate Year-to-Date ▼

500.00

Date of Receipt

M M / D D / Y Y Y Y  
0 1 / 1 0 / 2 0 0 8

Transaction ID: 6507140

Amount of Each Receipt this Period

500.00

**B.**

Full Name (Last, First, Middle Initial)

Mr. Boyd Lee Williams

Mailing Address 7023 W. Williamette Ave

City

Kennewick

State

WA

Zip Code

99336-1280

FEC ID number of contributing  
federal political committee.

C

Name of Employer  
Kansas City Life Insurance  
Company

Occupation  
Sales Manager

Receipt For:

☐ Primary ☐ General  
☐ Other (specify) ▼

Aggregate Year-to-Date ▼

208.00

Date of Receipt

M M / D D / Y Y Y Y  
0 1 / 1 0 / 2 0 0 8

Transaction ID: 6507734

Amount of Each Receipt this Period

208.00

**C.**

Full Name (Last, First, Middle Initial)

Ms. Linda Ray

Mailing Address 944 Sena Drive

City

Metairie

State

LA

Zip Code

70005

FEC ID number of contributing  
federal political committee.

C

Name of Employer  
Better Benefits Inc.

Occupation  
President

Receipt For:

☐ Primary ☐ General  
☐ Other (specify) ▼

Aggregate Year-to-Date ▼

1250.00

Date of Receipt

M M / D D / Y Y Y Y  
0 1 / 2 2 / 2 0 0 8

Transaction ID: 6510230

Amount of Each Receipt this Period

1250.00

**SUBTOTAL** of Receipts This Page (optional) .....

1958.00

**TOTAL** This Period (last page this line number only) .....

# **SCHEDULE A (FEC Form 3X)** **ITEMIZED RECEIPTS**

Use separate schedule(s)  
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Detailed Summary Page

FOR LINE NUMBER: PAGE 11 / 20

(check only one)

☒ 11a ☐ 11b ☐ 11c ☐ 12  
☐ 13 ☐ 14 ☐ 15 ☐ 16 ☐ 17

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NAME OF COMMITTEE (In Full)

National Association of Insurance and Financial Advisors Political Action Comm

**A.**

Full Name (Last, First, Middle Initial)

Mr. Jerry Borrowman

Mailing Address 11882 S. Oakridge Rd.

City

Sandy

State

UT

Zip Code

84094-5618

FEC ID number of contributing  
federal political committee.

C

Name of Employer  
Beneficial Life-Home Office

Occupation

Managing Director

Receipt For:

☐ Primary ☐ General  
☐ Other (specify) ▼

Aggregate Year-to-Date ▼

250.00

Date of Receipt

M M / D D / Y Y Y Y  
0 1 / 1 6 / 2 0 0 8

Transaction ID: 6510256

Amount of Each Receipt this Period

250.00

**B.**

Full Name (Last, First, Middle Initial)

Mr. John E. Parham, Jr.

Mailing Address 3322 West End Ave #201

City

Nashville

State

TN

Zip Code

37203-6816

FEC ID number of contributing  
federal political committee.

C

Name of Employer  
Parham Agency

Occupation

Branch Manager

Receipt For:

☐ Primary ☐ General  
☐ Other (specify) ▼

Aggregate Year-to-Date ▼

500.00

Date of Receipt

M M / D D / Y Y Y Y  
0 1 / 2 5 / 2 0 0 8

Transaction ID: 6510342

Amount of Each Receipt this Period

500.00

**C.**

Full Name (Last, First, Middle Initial)

Mr. Albert Moriarty

Mailing Address 245 N 14th Street

City

Grover Beach

State

CA

Zip Code

93433-2253

FEC ID number of contributing  
federal political committee.

C

Name of Employer  
Moriarty Enterprises

Occupation

General Agent

Receipt For:

☐ Primary ☐ General  
☐ Other (specify) ▼

Aggregate Year-to-Date ▼

250.00

Date of Receipt

M M / D D / Y Y Y Y  
0 1 / 2 5 / 2 0 0 8

Transaction ID: 6510346

Amount of Each Receipt this Period

250.00

**SUBTOTAL** of Receipts This Page (optional) .....

1000.00

**TOTAL** This Period (last page this line number only) .....

# **SCHEDULE A (FEC Form 3X)** **ITEMIZED RECEIPTS**

Use separate schedule(s)  
for each category of the  
Detailed Summary Page

FOR LINE NUMBER: PAGE 12 / 20

(check only one)

☒ 11a ☐ 11b ☐ 11c ☐ 12  
☐ 13 ☐ 14 ☐ 15 ☐ 16 ☐ 17

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NAME OF COMMITTEE (In Full)

National Association of Insurance and Financial Advisors Political Action Comm

**A.**

Full Name (Last, First, Middle Initial)

Mr. John R. Yaissle

Mailing Address 4221 Ravenswood Road

City

Allentown

State

PA

Zip Code

18103-9676

FEC ID number of contributing  
federal political committee.

C

Name of Employer  
Cornerstone Advisors

Occupation  
President

Receipt For:

☐ Primary ☐ General  
☐ Other (specify) ▼

Aggregate Year-to-Date ▼

250.00

Date of Receipt

M M / D D / Y Y Y Y  
0 1 / 1 8 / 2 0 0 8

Transaction ID: 6510364

Amount of Each Receipt this Period

250.00

**B.**

Full Name (Last, First, Middle Initial)

Mr. John J. Tarditi, Jr.

Mailing Address 412 Washington Ave

City

Haddonfield

State

NJ

Zip Code

08033-3327

FEC ID number of contributing  
federal political committee.

C

Name of Employer  
Commerce Insurance Servic-  
es

Occupation  
Vice Chairman

Receipt For:

☐ Primary ☐ General  
☐ Other (specify) ▼

Aggregate Year-to-Date ▼

600.00

Date of Receipt

M M / D D / Y Y Y Y  
0 1 / 1 8 / 2 0 0 8

Transaction ID: 6510368

Amount of Each Receipt this Period

600.00

**C.**

Full Name (Last, First, Middle Initial)

Ms. Sheila F. Gaylor

Mailing Address 2975 Thrush Dr #135

City

Melbourne

State

FL

Zip Code

32935-4593

FEC ID number of contributing  
federal political committee.

C

Name of Employer  
Bill and Sheila Gaylor/In-  
surance Profe

Occupation  
Vice President

Receipt For:

☐ Primary ☐ General  
☐ Other (specify) ▼

Aggregate Year-to-Date ▼

250.00

Date of Receipt

M M / D D / Y Y Y Y  
0 1 / 2 2 / 2 0 0 8

Transaction ID: 6510432

Amount of Each Receipt this Period

250.00

**SUBTOTAL** of Receipts This Page (optional) .....

1100.00

**TOTAL** This Period (last page this line number only) .....

# **SCHEDULE A (FEC Form 3X)** **ITEMIZED RECEIPTS**

Use separate schedule(s)  
for each category of the  
Detailed Summary Page

FOR LINE NUMBER: PAGE 13 / 20

(check only one)

☒ 11a ☐ 11b ☐ 11c ☐ 12  
☐ 13 ☐ 14 ☐ 15 ☐ 16 ☐ 17

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NAME OF COMMITTEE (In Full)

National Association of Insurance and Financial Advisors Political Action Comm

**A.**

Full Name (Last, First, Middle Initial)

Mr. Richard S. Berger

Mailing Address 46 Casino Drive

City

Farmingdale

State

NJ

Zip Code

07727-3700

FEC ID number of contributing  
federal political committee.

C

Name of Employer  
Creative Financial Group  
of New Jersey

Occupation

Insurance Agent

Receipt For:

☐ Primary ☐ General  
☐ Other (specify) ▼

Aggregate Year-to-Date ▼

300.00

Date of Receipt

M M / D D / Y Y Y Y  
0 1 / 2 4 / 2 0 0 8

Transaction ID: 6510442

Amount of Each Receipt this Period

300.00

**B.**

Full Name (Last, First, Middle Initial)

Mr. John Abernethy

Mailing Address 59449 Keria Trail

City

South Bend

State

IN

Zip Code

46614-3832

FEC ID number of contributing  
federal political committee.

C

Name of Employer  
Northwestern Mutual

Occupation

Insurance Agent

Receipt For:

☐ Primary ☐ General  
☐ Other (specify) ▼

Aggregate Year-to-Date ▼

500.00

Date of Receipt

M M / D D / Y Y Y Y  
0 1 / 2 2 / 2 0 0 8

Transaction ID: 6510520

Amount of Each Receipt this Period

500.00

**C.**

Full Name (Last, First, Middle Initial)

Mr. Alan M. Spiegelman

Mailing Address 127 Underhill

City

Mill Valley

State

CA

Zip Code

94941-1461

FEC ID number of contributing  
federal political committee.

C

Name of Employer  
Northwestern Mutual Finan-  
cial Network

Occupation

Insurance Agent

Receipt For:

☐ Primary ☐ General  
☐ Other (specify) ▼

Aggregate Year-to-Date ▼

250.00

Date of Receipt

M M / D D / Y Y Y Y  
0 1 / 3 1 / 2 0 0 8

Transaction ID: 6510586

Amount of Each Receipt this Period

250.00

**SUBTOTAL** of Receipts This Page (optional) .....

1050.00

**TOTAL** This Period (last page this line number only) .....

# **SCHEDULE A (FEC Form 3X)** **ITEMIZED RECEIPTS**

Use separate schedule(s)  
for each category of the  
Detailed Summary Page

FOR LINE NUMBER: PAGE 14 / 20

(check only one)

☒ 11a ☐ 11b ☐ 11c ☐ 12  
☐ 13 ☐ 14 ☐ 15 ☐ 16 ☐ 17

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NAME OF COMMITTEE (In Full)

National Association of Insurance and Financial Advisors Political Action Comm

**A.**

Full Name (Last, First, Middle Initial)

Mr. Peter D. Lizotte

Mailing Address 109 S Rossmore Ave

City

Los Angeles

State

CA

Zip Code

90004-3736

FEC ID number of contributing  
federal political committee.

C

Name of Employer  
Executive Financial, Inc.

Occupation

Insurance Agent

Receipt For:

☐ Primary

☐ General

☐ Other (specify) ▼

Aggregate Year-to-Date ▼

250.00

Date of Receipt

M M / D D / Y Y Y Y Y  
0 1 / 3 1 / 2 0 0 8

Transaction ID: 6510662

Amount of Each Receipt this Period

250.00

**B.**

Full Name (Last, First, Middle Initial)

Mrs. Diane K. Neely

Mailing Address 6635 SW Ventura Dr

City

Portland

State

OR

Zip Code

97223-9186

FEC ID number of contributing  
federal political committee.

C

Name of Employer  
Diane Neely Agency

Occupation

Insurance Agent

Receipt For:

☐ Primary

☐ General

☐ Other (specify) ▼

Aggregate Year-to-Date ▼

105.00

Date of Receipt

M M / D D / Y Y Y Y Y  
0 1 / 1 0 / 2 0 0 8

Transaction ID: 6510810

Amount of Each Receipt this Period

105.00

**C.**

Full Name (Last, First, Middle Initial)

Mr. Chris T. Christensen

Mailing Address 22501 Windermere Court

City

Farmington

State

MI

Zip Code

48336

FEC ID number of contributing  
federal political committee.

C

Name of Employer  
The Advanced Strategies  
Group

Occupation

President

Receipt For:

☐ Primary

☐ General

☐ Other (specify) ▼

Aggregate Year-to-Date ▼

400.00

Date of Receipt

M M / D D / Y Y Y Y Y  
0 1 / 1 4 / 2 0 0 8

Transaction ID: 6510892

Amount of Each Receipt this Period

400.00

**SUBTOTAL** of Receipts This Page (optional) .....

755.00

**TOTAL** This Period (last page this line number only) .....

# **SCHEDULE A (FEC Form 3X)** **ITEMIZED RECEIPTS**

Use separate schedule(s)  
for each category of the  
Detailed Summary Page

FOR LINE NUMBER: PAGE 15 / 20

(check only one)

☒ 11a ☐ 11b ☐ 11c ☐ 12  
☐ 13 ☐ 14 ☐ 15 ☐ 16 ☐ 17

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NAME OF COMMITTEE (In Full)

National Association of Insurance and Financial Advisors Political Action Comm

**A.**

Full Name (Last, First, Middle Initial)

Mr. Bryon A. Holz

Mailing Address 207 Cindy Ln

City

Brandon

State

FL

Zip Code

33510-3905

FEC ID number of contributing  
federal political committee.

C

Name of Employer  
AIG Advisor Group

Occupation

Agency Branch Manager

Receipt For:

☐ Primary ☐ General  
☐ Other (specify) ▼

Aggregate Year-to-Date ▼

300.00

Date of Receipt

M M / D D / Y Y Y Y  
0 1 / 1 4 / 2 0 0 8

Transaction ID: 6510970

Amount of Each Receipt this Period

300.00

**B.**

Full Name (Last, First, Middle Initial)

Mr. Guy E. Baker

Mailing Address 30172 Branding Iron Rd

City

San Juan Capo

State

CA

Zip Code

92675-1501

FEC ID number of contributing  
federal political committee.

C

Name of Employer  
BTA Advisory Group

Occupation

Insurance Agent

Receipt For:

☐ Primary ☐ General  
☐ Other (specify) ▼

Aggregate Year-to-Date ▼

500.00

Date of Receipt

M M / D D / Y Y Y Y  
0 1 / 1 4 / 2 0 0 8

Transaction ID: 6510974

Amount of Each Receipt this Period

500.00

**C.**

Full Name (Last, First, Middle Initial)

Mr. Kevin J. Halloran

Mailing Address One Indian Head Plaza Ste. 515

City

Nashua

State

NH

Zip Code

03060-1227

FEC ID number of contributing  
federal political committee.

C

Name of Employer  
Weisman, Tessier, Lambert  
& Halloran

Occupation

Sales Manager/Equity Coordinator

Receipt For:

☐ Primary ☐ General  
☐ Other (specify) ▼

Aggregate Year-to-Date ▼

1194.91

Date of Receipt

M M / D D / Y Y Y Y  
0 1 / 1 4 / 2 0 0 8

Transaction ID: 6510976

Amount of Each Receipt this Period

1194.91

**SUBTOTAL** of Receipts This Page (optional) .....

1994.91

**TOTAL** This Period (last page this line number only) .....

# **SCHEDULE A (FEC Form 3X)** **ITEMIZED RECEIPTS**

Use separate schedule(s)  
for each category of the  
Detailed Summary Page

FOR LINE NUMBER: PAGE 16 / 20

(check only one)

☒ 11a ☐ 11b ☐ 11c ☐ 12  
☐ 13 ☐ 14 ☐ 15 ☐ 16 ☐ 17

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NAME OF COMMITTEE (In Full)

National Association of Insurance and Financial Advisors Political Action Comm

**A.**

Full Name (Last, First, Middle Initial)

Mr. Mark Swartz

Mailing Address 9833 Avenel Farm Drive

City

Potomac

State

MD

Zip Code

20854

FEC ID number of contributing  
federal political committee.

C

Name of Employer  
AXA Advisors, LLC

Occupation

Branch Manager

Receipt For:

☐ Primary ☐ General  
☐ Other (specify) ▼

Aggregate Year-to-Date ▼

420.00

Date of Receipt

M M / D D / Y Y Y Y  
0 1 / 0 4 / 2 0 0 8

Transaction ID: 6511052

Amount of Each Receipt this Period

420.00

**B.**

Full Name (Last, First, Middle Initial)

Mr. Donald W. Sigmund

Mailing Address 3843 Macomb Street N W

City

Washington

State

DC

Zip Code

20016-3704

FEC ID number of contributing  
federal political committee.

C

Name of Employer  
Wolf & Cohen Ins Group

Occupation

Insurance Agent

Receipt For:

☐ Primary ☐ General  
☐ Other (specify) ▼

Aggregate Year-to-Date ▼

240.00

Date of Receipt

M M / D D / Y Y Y Y  
0 1 / 0 8 / 2 0 0 8

Transaction ID: 6511054

Amount of Each Receipt this Period

240.00

**C.**

Full Name (Last, First, Middle Initial)

Mr. Bryan M. Krupin

Mailing Address 649 26th Street

City

Manhattan Beach

State

CA

Zip Code

90266

FEC ID number of contributing  
federal political committee.

C

Name of Employer  
AXA Advisors, LLC

Occupation

Insurance Agent

Receipt For:

☐ Primary ☐ General  
☐ Other (specify) ▼

Aggregate Year-to-Date ▼

500.00

Date of Receipt

M M / D D / Y Y Y Y  
0 1 / 0 8 / 2 0 0 8

Transaction ID: 6511058

Amount of Each Receipt this Period

500.00

**SUBTOTAL** of Receipts This Page (optional) .....

1160.00

**TOTAL** This Period (last page this line number only) .....



# **SCHEDULE A (FEC Form 3X)** **ITEMIZED RECEIPTS**

Use separate schedule(s)  
for each category of the  
Detailed Summary Page

FOR LINE NUMBER: PAGE 17 / 20

(check only one)

☒ 11a ☐ 11b ☐ 11c ☐ 12  
☐ 13 ☐ 14 ☐ 15 ☐ 16 ☐ 17

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NAME OF COMMITTEE (In Full)

National Association of Insurance and Financial Advisors Political Action Comm

**A.**

Full Name (Last, First, Middle Initial)

Mr. James Williard Eaton

Mailing Address 5387 Beulah Drive

City

ljamsville

State

MD

Zip Code

21754-9603

FEC ID number of contributing  
federal political committee.

C

Name of Employer  
Prudential Financial

Occupation

Maryland State Membership Chair

Receipt For:

☐ Primary ☐ General  
☐ Other (specify) ▼

Aggregate Year-to-Date ▼

500.00

Date of Receipt

M M / D D / Y Y Y Y Y  
0 1 / 3 1 / 2 0 0 8

Transaction ID: 6549245

Amount of Each Receipt this Period

500.00

**B.**

Full Name (Last, First, Middle Initial)

Mr. Mark E. Kull

Mailing Address 3008 S 6th St

City

Louisville

State

KY

Zip Code

40208-1314

FEC ID number of contributing  
federal political committee.

C

Name of Employer  
Northwestern Mutual

Occupation

AGENT

Receipt For:

☐ Primary ☐ General  
☐ Other (specify) ▼

Aggregate Year-to-Date ▼

300.00

Date of Receipt

M M / D D / Y Y Y Y Y  
0 1 / 3 0 / 2 0 0 8

Transaction ID: 6549341

Amount of Each Receipt this Period

300.00

**C.**

Full Name (Last, First, Middle Initial)

Mr. Joe Dale Viniard

Mailing Address 7413 Cambridge Dr.

City

Crestwood

State

KY

Zip Code

40014-8931

FEC ID number of contributing  
federal political committee.

C

Name of Employer  
State Farm Insurance Comp-  
anies

Occupation

Insurance Agent

Receipt For:

☐ Primary ☐ General  
☐ Other (specify) ▼

Aggregate Year-to-Date ▼

0.00

Date of Receipt

M M / D D / Y Y Y Y Y  
0 1 / 3 1 / 2 0 0 8

Transaction ID: 6549343

Amount of Each Receipt this Period

-219.00

**SUBTOTAL** of Receipts This Page (optional) .....

581.00

**TOTAL** This Period (last page this line number only) .....

# **SCHEDULE A (FEC Form 3X)** **ITEMIZED RECEIPTS**

Use separate schedule(s)  
for each category of the  
Detailed Summary Page

FOR LINE NUMBER: PAGE 18 / 20

(check only one)

☒ 11a ☐ 11b ☐ 11c ☐ 12  
☐ 13 ☐ 14 ☐ 15 ☐ 16 ☐ 17

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NAME OF COMMITTEE (In Full)

National Association of Insurance and Financial Advisors Political Action Comm

**A.**

Full Name (Last, First, Middle Initial)

Ms. Rita A. Kerber

Mailing Address 1941 E 135th Pl

City

Thornton

State

CO

Zip Code

80241-4110

FEC ID number of contributing  
federal political committee.

C

Name of Employer  
Colorado Brokerage Group

Occupation

Brokerage Representative

Receipt For:

☐ Primary ☐ General  
☐ Other (specify) ▼

Aggregate Year-to-Date ▼

250.00

Date of Receipt

M M / D D / Y Y Y Y  
0 1 / 3 1 / 2 0 0 8

Transaction ID: 6549345

Amount of Each Receipt this Period

250.00

**B.**

Full Name (Last, First, Middle Initial)

Mrs. Diane K. Neely

Mailing Address 6635 SW Ventura Dr

City

Portland

State

OR

Zip Code

97223-9186

FEC ID number of contributing  
federal political committee.

C

Name of Employer  
Diane Neely Agency

Occupation

Insurance Agent

Receipt For:

☐ Primary ☐ General  
☐ Other (specify) ▼

Aggregate Year-to-Date ▼

210.00

Date of Receipt

M M / D D / Y Y Y Y  
/ / /

Transaction ID: PR14054541761

Amount of Each Receipt this Period

105.00

P/R Deduction (\$0.00 )

**SUBTOTAL** of Receipts This Page (optional) .....

355.00

**TOTAL** This Period (last page this line number only) .....

13127.91

# **SCHEDULE B (FEC Form 3X)** **ITEMIZED DISBURSEMENTS**

Use separate schedule(s)  
for each category of the  
Detailed Summary Page

FOR LINE NUMBER:  
(check only one)

PAGE 19 / 20

<input checked="" type="checkbox"/> 21b	<input type="checkbox"/> 22	<input type="checkbox"/> 23	<input type="checkbox"/> 24	<input type="checkbox"/> 25	<input type="checkbox"/> 26
<input type="checkbox"/> 27	<input type="checkbox"/> 28a	<input type="checkbox"/> 28b	<input type="checkbox"/> 28c	<input type="checkbox"/> 29	<input type="checkbox"/> 30b

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NAME OF COMMITTEE (In Full)

National Association of Insurance and Financial Advisors Political Action Comm

A.

Full Name (Last, First, Middle Initial)

Wachovia

Mailing Address P.O. box 40031

City  
Roanoke

State  
VA

Zip Code  
24022-0031

Purpose of Disbursement  
BANK FEES

Candidate Name

001  
Category/  
Type

Office Sought: ☐ House  
☐ Senate  
☐ President

State:

District:

Disbursement For:

☐ Primary ☐ General  
☐ Other (specify) ▼

Transaction ID: 6550750

Date of Disbursement

01 / 28 / 2008

Amount of Each Disbursement this Period

2014.73

BANK FEES

SUBTOTAL of Disbursements This Page (optional) .....

2014.73

TOTAL This Period (last page this line number only) .....

2014.73

**SCHEDULE D (FEC Form 3X)****DEBTS AND OBLIGATIONS****Excluding Loans**(Use separate  
schedule(s)  
for each  
numbered line)

PAGE 20 / 20

FOR LINE NUMBER:  
(check only one)☐ 9  
☒ 10

NAME OF COMMITTEE (In Full)

National Association of Insurance and Financial Advisors Political Action Comm

**A.** Full Name (Last, First, Middle Initial) of Debtor or Creditor  
National Association if Insurance and Financial Advisors  
Political Action CommNature of Debt (Purpose):  
Payrol, Benefits, Supplie-  
s, Copies, etc

Mailing Address 2901 Telestar Court

City State ZIP Code  
Falls Church VA 22042

Outstanding Balance Beginning This Period

104138.27

Transaction ID: 6550853

Amount Incurred This Period

0.00

Payment This Period

58650.78

Outstanding Balance at Close of This Period

45487.49

1) **SUBTOTALS** This Period This Page (optional)..... ▶

45487.49

2) **TOTALS** This Period (last page this line number only)..... ▶

45487.49

3) **TOTAL OUTSTANDING LOANS** from Schedule C (last page only)..... ▶

0.00

4) **ADD 2) and 3)** and carry forward to appropriate line of Summary Page (last page only)..... ▶

45487.49